

Top 9 Financial Advisors in Kansas City, Leawood, North Kansas City, & Overland Park | 2017 Ranking | Kansas and Missouri Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN KANSAS AND MISSOURI

Finding the Top Financial Advisor in Kansas City, Leawood, North Kansas City, & Overland Park

The economy may take dips and turns, but it is not totally unpredictable. With experience, education, and level-headedness, it is make strategic investment decisions and use the market to meet your short and long term goals. Of course, you may not have this helpful combination. In that case, paying a financial advisor in Kansas or Missouri to lend a hand can be a worthy investment.

The financial advisors in and around Kansas and Missouri may be 1,200 miles removed from Wall Street (more or less), but that doesn't mean Wall Street's influence doesn't reach the Heartland. Market fluctuations are felt nationwide and worldwide. This makes knowing what you're doing highly important.

Without a good wealth manager in Kansas or Missouri, your assets will be increasingly vulnerable to an often chaotic market. Securing your wealth, planning for the future, and optimizing your investments are only a few of the necessary steps you'll need to take to weather the inevitable financial storms.

To help you get started, we have identified nine of the best financial advisors in Missouri in and around the Kansas City area and in Kansas State as well.

If you value your hard-earned money and want to make sure your family, your loved ones, and your legacy are secure, look over our list of the best financial

advisors in Kansas and Missouri below. It has something for every serious investor.



Award Emblem: Top 9 Financial Advisors in Kansas and Missouri

AdvisoryHQ's List of the Top 9 Best Financial Advisors in Kansas and Missouri

List is sorted alphabetically (click any of the names above to go directly to the detailed review section for that advisor)

- [**Atwood & Palmer, Inc.**](#)
- [**Buttonwood Financial Group**](#)
- [**Frontier Wealth Management, LLC**](#)
- [**Nicholson Capital Management**](#)

- [Searcy Financial](#)
- [Sound Stewardship, LLC](#)
- [Sterneck Capital Management](#)
- [Sunrise Advisors, Inc.](#)
- [Windward Private Wealth Management Inc.](#)

Top 9 Financial Advisors in Kansas and Missouri | Brief Comparison

Financial Advisors in Missouri	Highlighted Features
Atwood & Palmer, Inc.	Small Team
Buttonwood Financial Group	Buttonwood Wealth Management Solution
Frontier Wealth Management, LLC	Team-Based Approach
Nicholson Capital Management	Legacy Services
Searcy Financial	Solutions for Special Needs Families
Sound Stewardship, LLC	Purposeful Living Process
Sterneck Capital Management	Personalized Process
Sunrise Advisors, Inc.	Core-Satellite Investment Approach
Windward Private Wealth Management, Inc.	The Windward Process

Table: Top 9 Best Financial Advisors in Kansas and Missouri | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ’s selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Financial Advisors in Kansas and Missouri

Below, please find the detailed review of each firm on our list of the best financial planners in Kansas and Missouri. We have highlighted some of the factors that allowed these wealth management firms in Kansas and Missouri to score so high in our selection ranking.

See Also: [Best Financial Advisors in Indianapolis, IN | Ranking | Indianapolis Wealth Managers](#)

Atwood & Palmer, Inc. Review

[Atwood & Palmer, Inc.](#) is a relatively small financial advisory firm in Kansas City, Missouri. The company was founded in 1990 by Bill Atwood and Steven N. Palmer. This Kansas City wealth management firm’s core ethics revolve around trust and respect for their clients and getting to know them before initiating any investment advice.

Since that time, the firm has relished its role as a boutique wealth manager in Kansas City whose staff remains small and personable to clients.

Atwood & Palmer is a fee-based wealth management firm in Kansas City. We typically focus on fee-only firms, but we have included this firm on the list for the services they provide.

Key Factors That Enabled This Firm To Rank as a Top Wealth Management Firm

Listed below are some of the features of Atwood & Palmer that merited the firm’s inclusion on our list of this year's top financial advisory firms in Kansas City.

Wealth of Services

Atwood & Palmer is a financial advisor in Kansas City that has something for everybody.

They offer standard wealth management services that you would expect from a top Kansas City wealth management firm. If you're looking for an advisor to help with your retirement planning, then Atwood & Palmer can help you there as well.

They also give investment advice based around your needs and goals. Going beyond wealth management, Atwood helps you manage your estate and taxes, too, with the aim of developing a tax-efficient strategy that will lighten your tax burdens.

For those investors who are seeking to invest for others, Atwood & Palmer can help you plan your children's college funding as well as your philanthropic giving.

Small & Powerful

Are you looking for a financial advisory firm in Kansas City that boasts low client-to-advisor ratios? Then Atwood & Palmer meets that need.

The [Kansas City financial advisors](#) at Atwood & Palmer give you their full attention from day one. Counselors are not overloaded with clients, and as a result their time and availability does not become strained.

What does this mean for you? It means that when you hire a Kansas City financial advisor at Atwood & Palmer to manage your wealth, you're hiring someone who will be there for you whenever you need assistance. You will not be assigned to an assistant Investment Counselor or speak to your primary account manager once or twice a year.

Regular, Open Communication

When you hire a Kansas City wealth management firm, you want to make sure of two things:

- They reach out consistently and regularly to discuss your portfolio.
- They are more than willing to hear from you when you have questions or concerns.

Atwood & Palmer joined our list of the best financial advisors in Kansas City because they are committed to both of these principles. Not only do they take the lead on contacting their clients, but they are always available when their clients want to initiate contact, too.

Top-Notch Website

While you may have been told not to judge a book by its cover, a company's [website](#) speaks volumes about their business. With this in mind, one of the things that impressed us about Atwood & Palmer is their professional, user-friendly website.

Many financial advisors burden their sites with complicated navigation menus or overly-long explanations of services. Other advisor sites are so bare-bones that they provide little to no feel for how they operate or their level of professionalism.

Not so with Atwood. Their site is clean, crisp, pleasing to the eye and intuitive. Their home page introduces you to the company through a short video. From there, navigating this Kansas City wealth management firm's site couldn't get any easier.

Atwood & Palmer goes to great lengths to make sure your online experience with them is first-rate. It says a lot about how they want to make a great first impression as a top wealth manager in Kansas City.

Customized to Fit You

The Investment Counselors at Atwood & Palmer know their stuff. They know how to spot worthwhile opportunities and how to structure your portfolio around low-risk investments.

But this doesn't mean they default to certain assets or fall back on a stock portfolio. Rather, these Kansas City financial planners collect all the pertinent info about your current financial situation before they factor in your needs and your goals for the future.

From there, their team of Kansas City financial advisors build a financial plan that takes into consideration where you are and where you want to be. You don't have to worry about being squeezed into someone else's plan, following market fads, or chasing short-term trends.

Atwood & Palmer gives you the individual attention necessary to craft a customized plan, one with a conservative approach that minimizes taxes and prioritizes your risk tolerance.

Credentialed & Experienced

The Investment Counselors on the Atwood & Palmer team have over 100 years of combined experience. Combined with founder Bill Atwood's experience of 47 years of experience, this makes Atwood & Palmer one of the most experienced financial advisors in Kansas City, Missouri.

That experience is strengthened by their education and credentials. Currently on staff are counselors who have earned their Masters of Business Administration as well as Chartered Financial Analyst designations. With Atwood & Palmer, you get counselors who have both the tenure and the know-how to effectively manage your wealth.

[Don't Miss: Best Financial Advisors in Des Moines, Ames & Davenport, IA | Ranking | Des Moines Area Wealth Managers](#)

Buttonwood Financial Group Review

[Buttonwood Financial Group](#) is a Kansas City financial advisor that was founded almost a decade ago by Jon McGraw. McGraw started Buttonwood after witnessing firsthand his clients' displeasure when his employer was purchased by a large bank conglomerate. Since then, Buttonwood has grown into a Kansas City wealth management firm that includes several advisors, becoming one of the best Kansas City wealth management firms.

Buttonwood Financial is a fee-based wealth management firm in Kansas City, but we have included them on our list for the comprehensive services they provide.



Key Factors That Enabled This Firm To Rank as a Top Wealth Management Firm

Listed below are some of the features of Buttonwood Financial Group that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas City.

Real Life Stories

One of the standout features of Buttonwood's website is their focus on personal stories of financial [success from real life clients](#).

The stories address popular concerns among most wealth management clients. One story, for instance, tells of a couple with that sold their business for millions of dollars only to be faced with the daunting task of deciding where to put it. When you suddenly have that much in cash, leaving it in the bank is foolish for two reasons:

1. It's over the deposit insurance limit.
2. It isn't meeting its earning potential.

With the help of the Kansas City financial planners at Buttonwood this couple was able to get their financial ducks in a row, invest their money strategically, and ensure their estate was in order.

Another story tells of a woman who had always left the finances to his husband. When he died she was left to manage things on her own. While he had done an excellent job of ensuring she would be taken care of after he died, she had difficulty understanding the information necessary to properly manage the money he'd set aside. By visiting this Kansas City wealth management firm, she received the expert advice she needed to make wise financial decisions.

These stories on Buttonwood's site speak to the firm's success in wealth management and financial consultation. It is one of the things that put them on our list of the top wealth management firms in Kansas City.

Tailored Plans Across Several Services

Buttonwood gets high marks as a wealth management firm in Kansas City because of the [array of services](#) they offer.

Whether you're interested in getting your taxes in order or creating a plan for your estate, Buttonwood has you covered. The same is true if you need advice on maximizing your insurance, investments, or overall financial planning.

But no matter what service you choose, the Kansas City financial advisors at Buttonwood Financial Group tailor a plan to your needs. Each plan is customized and personal, giving you and your money the careful, individualized attention you're looking for.

Community Involvement

Giving back to the community is a big part of Buttonwood's identity. This wealth management firm in Kansas City supports local charitable organizations through financial donations and volunteerism.

Donations are made via The Buttonwood Foundation, a private foundation which allocates a portion of Buttonwood Financial Group Revenue for charitable giving purposes.

Some areas of interest to The Buttonwood Foundation [include](#):

- Arts
- Education
- Medicine
- The environment
- Childhood abuse and recovery

- Disability services

Rich Resources

Visiting Buttonwood Financial Group's website reveals how highly they regard client education. The *Resources* section of their site boasts a wealth of links for any investor with an interest in furthering their own knowledge.

The site features a *Monthly Focus* section that highlights an important topic that is close to investors' hearts, such as retirement planning or life insurance. This Kansas City wealth management firm also keeps a [wealth management blog](#) with articles published regularly by the team.

The *Resource Library* section features a link to helpful articles published outside Buttonwood's website.

Deliberate Planning with Ongoing Communication

Buttonwood's financial planning process begins when you sit down with your advisor. They listen to your concerns and your goals, answer your questions, and explain their services.

After you decide that Buttonwood is right for you, your Kansas City financial advisor draws up a plan for you to consider. This plan includes choice assets and strategies for maximizing your investments. The [Buttonwood Wealth Management Solution \(BWMS\)](#) is the tool with ability to provide a dynamic plan and share the results with clients 24/7.

Based on your feedback, this Kansas City wealth management firm either revises your plan or implements it. Buttonwood is committed to getting the process right, which means confirming that you're fully comfortable with the plan that is drawn up for you. Then, and only then, will Buttonwood proceed with putting your plan into action.

After that, you meet with your financial advisor in Kansas City either semi-annually or quarterly at minimum. Because of Buttonwood's commitment to client satisfaction and doing what's best for you, they will meet with you on a more frequent basis if you wish.

[Related: Best Financial Advisors in San Francisco, Oakland, Corte Madera, CA | Ranking | San Francisco Area Wealth Managers](#)

Frontier Wealth Management, LLC Review

[Frontier Wealth Management, LLC](#) is a family-owned Registered Investment Advisor in Kansas City, Missouri, that was founded in 2007. It has [six offices](#) split between Georgia, Illinois, Colorado, Missouri, and Kansas.

Noteworthy among Frontier's many excellent features is its division of labor. Advisors work one-on-one with clients while being supported by a team of Specialists.

Specialists are [experts in their given field](#), helping to optimize and refine the plans that Frontier crafts for its clients. This two-pronged system makes Frontier unique among Kansas City Registered Investment Advisory firms.

This Kansas City wealth management firm does not explicitly say that they are fee-only. Instead, they explain that any fees charged by a third party or sub-advisor are separate from the fees that clients pay. Interested individuals can read more about their compensation structure [here](#).

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Frontier Wealth Management that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas City.

Work as a Team

Frontier employs Specialists who support their Kansas City financial advisors to assist you in every facet of your financial plan.

From estate planning to tax planning, and from investment strategies to insurance planning, Frontier's team of financial advisors in Kansas City puts their collective knowledge to work in rounding out your plan.

Because of Frontier's team-oriented approach, they can provide a suite of comprehensive, harmonized services. Moreover, each Specialist will drill down further into their specific concentration, giving you a more profound level of

expert advice than what you'll find at most financial advisory firms in Kansas City and elsewhere.

As a result, your plan will be a precise reflection of your needs while better serving you in reaching your goals.

Resources

Frontier includes a wealth of information and resources on their website for investors and clients who want to learn more about money management. Proactivity is key to ensuring your financial security, and this resources page provides a space for clients and investors to start their learning and research.

The [Resources page](#) includes a link to subscribe to their quarterly newsletter, helpful infographics on topics like retirement, an explanation of what it means for Frontier to be a Registered Investment Advisor, and external links to helpful sites and articles.

Open & Engaged

In keeping with Frontier's willingness to be fully accountable to clients, they answer the call to stay engaged with them, as well.

Frontier wants to know what's on your mind. For this reason, this Kansas City wealth management firm is open to hearing from you whenever you have a question or concern regarding your financial plan.

Frontier does more, however, by staying engaged with you along the way. They are proactive in reaching out to you and listening to your needs.

Suite of Services

Frontier offers a [range of services](#) with the goal of providing a comprehensive wealth management plan to its clients.

If you're in the market for financial planning, this Kansas City wealth management firm provides you with a thorough, customized plan. Frontier's tax planning takes stock of your investment strategies and determines how best to make your plan tax efficient. Frontier also offers corporate retirement planning for businesses.

This wealth management firm in Kansas City can help clients with financial planning, risk management, tax planning, alternative investments, corporate retirement, and investing.

Nicholson Capital Management Review

[Nicholson Capital Management](#) is a Kansas City financial advisory firm established in 1988. The Nicholson team combines more than 60 years of experience in the financial advisory and wealth management arenas. Nicholson's specialty is wealth management, retirement plan sponsors, legacy services, and financial consulting for both individuals and institutions.

Nicholson Capital Management's site does not explicitly say that it is a fee-only wealth management firm in Kansas City, but the wording on their site suggests so. They [explain](#) that they receive compensation by charging clients a percentage of the assets under management, effectively tying their success to the client's success. Additionally, they say that they do not sell products.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Nicholson Capital Management that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas City.

A Pioneering Founder

In 1988, Jennifer D. Nicholson became one of the first women in Kansas City history to establish an independent financial advisory firm. Ten years later after co-founding the firm, she took over as owner and renamed the firm Nicholson Capital Management.

Prior to founding this wealth management firm in Kansas City, Jennifer Nicholson entered the financial services industry in 1972 as the first female management trainee for the First National Bank of Kansas City. She later blazed more trails when she was promoted to Vice President and Group Leader in the bank's Trust Division.

Custom Plans with Specific Investments

Nicholson likes to think of their advisory services as “transformational, not transactional.” This simply means that they “sit on the same side of the table” as you to create a plan that fits your goals and risk tolerance. Their Kansas City financial advisors are not simply concerned with increasing the firm's bottom line. They are also committed to ensuring that clients see returns.

Consistent, Two-Way Contact

One of the things that helped Nicholson make our list of top financial advisors in Kansas City was their open door policy.

Not only will the financial advisors at this wealth management firm in Kansas City [regularly keep in touch](#) with you, but they encourage you to contact them any time you need. You won't get shuffled around to assistants or leave multiple unreturned voicemails. Their boutique size and low client-to-advisor numbers ensure that the advisors at Nicholson will be available to address your concerns in a timely manner.

In addition, Nicholson sends [monthly statements](#) to keep you abreast of your investment performance. They also send reports, educational articles, newsletters, and market analysis to clients on a consistent basis.

Help During Personal Crisis

Nicholson Capital Management made our list of the best financial advisors in Kansas City for many reasons, but one aspect of this firm that we particularly appreciated came in the form of their Legacy Services division.

With [Legacy Services](#), this wealth management firm in Kansas City assists spouses and children who have lost a loved one. This includes helping them resolve bills, handle finances, minimize surprise expenses, distribute trusts, transfer privately-owned businesses, and more.

Nicholson understands that the tragedy of losing a family member can make life chaotic and confusing. They vow to stand beside you to help make the hard times a little easier.

[Popular Article: Best Financial Advisors in San Diego, CA | Ranking | San Diego Area Wealth Managers](#)

Searcy Financial Review

We look after our money so that we can live a more happy and secure life. Building wealth is a means for a nice life - not the purpose of living it. [Searcy Financial](#) is a wealth management firm in Overland Park, Kansas that understands this. Their objective is to help clients lead more purposeful and intentional lives, and their Kansas financial advisors have been helping people do that [since 1976](#).

Searcy Financial is a [fee-only](#) wealth management firm in Kansas.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Searcy Financial that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas.

Personal Wealth Services

Managing personal wealth is not just about putting a little money in the stock market. It is about considering the big picture of your life and asking yourself what you want it to look like. There are things you think are far off in the future that will creep up on you, like a child going away to college or your youngest moving out. Retirement may now be a matter of years instead of decades.

Taking inventory of your resources and figuring out how to properly allocate them is something a financial advisor in Kansas can help you do strategically.

Searcy Financial offers [personal wealth services](#) and solutions to help you figure out your life goals (even if you do not have a clear idea of them yet) and ensure you can comfortably work towards them. This Kansas wealth management firm takes a collaborative approach to your financial planning by including any other financial professionals you are already working with.

If the need for a specific kind of professional arises, like a tax attorney or accountant, and you do not yet have one, their Kansas financial advisors will look within their trusted network to help you find someone who is competent and suitable.

But the team of Kansas financial planners and advisors at Searcy are not just about outcomes. They are about a positive experience as well. They have outlined a specific process to make clients feel as comfortable as possible during planning. That process includes the following [steps](#) of activity:

1. Goals & Needs Discovery
2. Obstacles and Opportunities
3. Plan Presentation
4. Plan Agreement & Implementation
5. Review & Recalibration

This wealth management firm in Kansas offers specific services related to personal wealth [including](#):

- Wealth Planning
- Investment Management
- Retirement Plans
- Physician Services
- Generational and Family Financial Planning
- Special Solutions for Special Needs Families
- Retirement Planning
- Business & Practice Consulting
- End-of-Life Planning
- Situational Planning

Special Solutions for Special Needs Families

This is a distinctive offering from this Kansas wealth management firm. While a Kansas financial advisor at most firms can help families navigate almost any financial situation, this is one of the few firms to explicitly address this need.

Preparing for the future can be a challenging and emotionally prospect when you are doing so for a family member with special needs. Working with a professional can ensure that your loved one will have the long-term financial support they need.

This wealth management firm in Kansas [helps families with special needs members](#) find the resources they need and support them through the process of navigating Special Needs Trusts and asset protection. Their objective is two-fold: securing their future and giving clients the peace of mind to enjoy their time with their family instead of stressing about their financial well-being.

Group Retirement Plans

Business owners have to juggle a lot of responsibilities. Even those that are eager to offer their employees great retirement benefits may be uncertain about the legal responsibilities that come with offering them. A Kansas wealth management firm like Searcy Financial can help business owners with the serious work of managing a group plan, allowing them to focus on running their business instead.

Some of the group retirement plan services this Kansas wealth management firm [provides](#) are:

Employer-Sponsored Retirement Plans

- Simple IRA Plan
- SEP IRA Plan
- Solo 401(k)
- Traditional 401(k)
- Profit Sharing
- Defined Benefit
- Cash Balance

They also [provide](#):

- Open-Architected 401(k) Plans
- 3(38) Investment Management for Non-Fiduciary Advisors
- Independent Fiduciary Review

[Read More: Best Financial Advisors in Houston, TX | Ranking | Houston Wealth Management Firms](#)

Sound Stewardship, LLC Review

[Sound Stewardship, LLC](#) is a wealth management firm in Overland Park, Kansas. They emphasize the importance of "financial planning for purposeful living".

This Kansas wealth management firm's objective is to help clients make their dreams a reality while positively impacting the world around them. This partly stems from their focus on biblical values.

Sound Stewardship is a [fee-only](#) wealth management firm in Kansas.

Key Factors That Enabled This Firm to Rank as a Wealth Management Firm

Listed below are some of the features of Sound Stewardship that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas City.

Staying in Touch

Some financial advisors take your money, build and implement your financial plan, and then leave you twisting in the wind until your semi-annual meeting. When you call for an update on your account, you have to settle for speaking with an associate who isn't as familiar with your financials.

Fortunately, Sound Stewardship doesn't work that way. They reach out to you regularly with updates about your account. As your circumstances change, Sound Stewardship [helps you adjust](#) your investment strategies and financial planning accordingly. With Sound Stewardship, communication flows freely in both directions.

Comprehensive, Customized Financial Planning

Sound Stewardship offers services under two primary categories: financial planning and wealth management.

While these are staples among most financial advisors in Kansas, Sound Stewardship steps their game up a notch when it comes to their comprehensive financial planning service.

There's a reason that Sound Stewardship calls their process *comprehensive* financial planning. They meet with you and evaluate your financials in no less than 14 different areas.

The 14 items areas that this Kansas wealth management firm analyzes [includes](#):

- Cash flow & emergency reserves

- Net worth
- Major purchases & liquidations
- Retirement planning
- Tax planning
- Investment strategy, analysis, and management
- Insurance analysis
- Education planning
- Estate planning, including survivor support & wealth transfer
- Special needs planning for loved ones who have disabilities
- Philanthropic giving
- Credit review, including identity theft considerations
- Business planning, including succession
- Disaster preparedness

Such a thorough review warrants the name “comprehensive,” and it is one of the most comprehensive systems you’ll find among Kansas financial advisory firms.

Purposeful Living Process

Sound Stewardship’s *Purposeful Living Process* is a five-part timeline designed to help both you and the Kansas financial advisors at this firm gain a good understanding of your financial needs and goals.



The steps included in this process, in order, are as follows:

- **Life Impact Discovery**
- **Stewardship Accounting**
- **Meaningful Transformation**
- **Impact Alignment**
- **Lasting Significance**

Each phase of the process has a different objective. For instance:

- The **Life Impact** phase is meant to help you organize your thoughts regarding the kind of impact you wish to leave. Of special emphasis in this phase is how your wealth and financial resources contribute to that legacy.
- During **Stewardship Accounting**, your advisor at Sound Stewardship assists you in drawing an accurate “big picture” of your financial health. Sound Stewardship also analyzes weak spots in your finances as well as what has been successful.
- The **Meaningful Transformation** phase uses the first two phases as a springboard in creating your financial plan. In this way, your plan is informed by a realistic, fact-based understanding of where you stand financially and what needs to change for you to reach your impact goals.
- Once you have your personal affairs in order, the **Impact Alignment** phase involves taking the next step to how you’ll use your wealth to benefit others. Ideally, these benefits will start in your lifetime and continue as a part of your legacy.
- **Lasting Significance** is the fifth and final phase of the process. This is essentially the maintenance stage of your investment strategy. It involves both you and your Sound Stewardship advisor reviewing your account on a regular, consistent basis to evaluate your investment performance and make necessary changes.

Sound Stewardship Principles

By now, it seems everyone should know the basics of sound money management. Don’t spend more than you have, for instance and put money aside for emergencies.

But at Sound Stewardship, these Kansas financial advisors do more than give lip service to these ideas. Instead, they formed their entire philosophy around them, and each client's financial plan is crafted according to the same ideas.

Sound Stewardship calls these ideas *Sound Stewardship Principles*. They are:

- Live within your means
- Avoid going into debt
- Save for emergencies
- Think long-term
- Diversify

- Keep others in mind
- Be generous

[Related: Best Financial Advisors in Boston, MA | Ranking | Boston Area Wealth Management Firms](#)

Sterneck Capital Management Review

[Sterneck Capital Management](#) is a Registered Investment Advisor in Kansas City, Missouri. This Kansas City wealth management firm was first formed in New York City in 1989. It was founded by Frank M. Sterneck who eventually relocated the company to Kansas City in 2001.

Sterneck Capital management does not explicitly say whether they are a fee-based or fee-only firm. They outline their [compensation structure](#) online. These Kansas City financial advisors are compensated through an asset-based management fee, flat fee rates, or performance based fees.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Sterneck Capital Management that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas City.

Fiduciary Standard

Sterneck Capital [holds itself to the Fiduciary Standard](#) when managing your money. This wealth management firm in Kansas City submits itself to your best interests by working together with you to achieve your success.

As a result, they are completely open and transparent, and they will not recommend products, services, or affiliates based on commissions or incentives. Additionally, they will not invest your money in a way that is incongruent with your risk tolerance.

Experienced & Established

When you invest your money, you want to entrust someone who knows what they're doing. Preferably, an advisor or firm that has years under their belt and an extensive knowledge of wealth management.

You'll get just that with Sterneck Capital. Their advisors boast more than 120 years of combined experience, putting them vastly ahead of most Kansas City financial advisors in terms of years in the industry.

What's more, Sterneck itself has been in business for more than 25 years. Not only do you get experienced advisors with this Kansas City wealth management firm, but you get a stable, established firm that you can trust.

Personalized Process

Each investor's needs are different, and their individual financial situation is too. Because of this, the advice given to one client will not necessarily work for another.

Sterneck understands this, which is why their financial plans are personalized and tailored to each client. To guarantee that each plan addresses each relevant area of a client's life, this Kansas City wealth management firm helps them through a discovery process.

The [discovery process](#) is made up of five parts:

- Sterneck **evaluates** your financial posture, analyzing your needs, assets, and portfolio.
- The firm then **assesses** your risk tolerance.
- They **balance** your risk tolerance with the appropriate amount of risk needed to meet your goals.
- Next comes **crafting** your personalized portfolio along with your implementation plan. Sterneck focuses on undervalued securities while identifying proper entry/exit points.
- Sterneck then **monitors** your portfolio. This includes actively managing your accounts and initiating regular comprehensive reviews.

Sunrise Advisors, Inc. Review

[Sunrise Advisors, Inc.](#) is a Registered Investment Advisor (RIA) in Leawood, Kansas. They were established in 1993 and have been family-owned through multiple generations.

Sunrise Advisors is a [fee-only](#) wealth management firm in Kansas.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Sunrise Advisors, Inc. that merited the firm's inclusion on our list of this year's top financial advisory firms in Kansas.

Fee-Only & Fiduciary

Sunrise Advisors prides itself on doing what's best for its clients. They operate according to the fiduciary standard and receive their compensation through a fee-only structure.

When you hire Sunrise, you are hiring a wealth management firm in Kansas that has taken the effort to prove its commitment to transparency and client care. Their legal obligation is to benefit you, not to line their own pockets at your expense. To that end, you can be assured of a Kansas financial advisor who is honest and upfront with you every step of the way.

Independent Structure

Sunrise is independent, which means it does not have a parent company dictating its business model or its culture. This allows this Kansas wealth management firm to operate in a way that puts the client at the center of all conversations, priorities, and transactions. This allows them to provide unbiased advice.

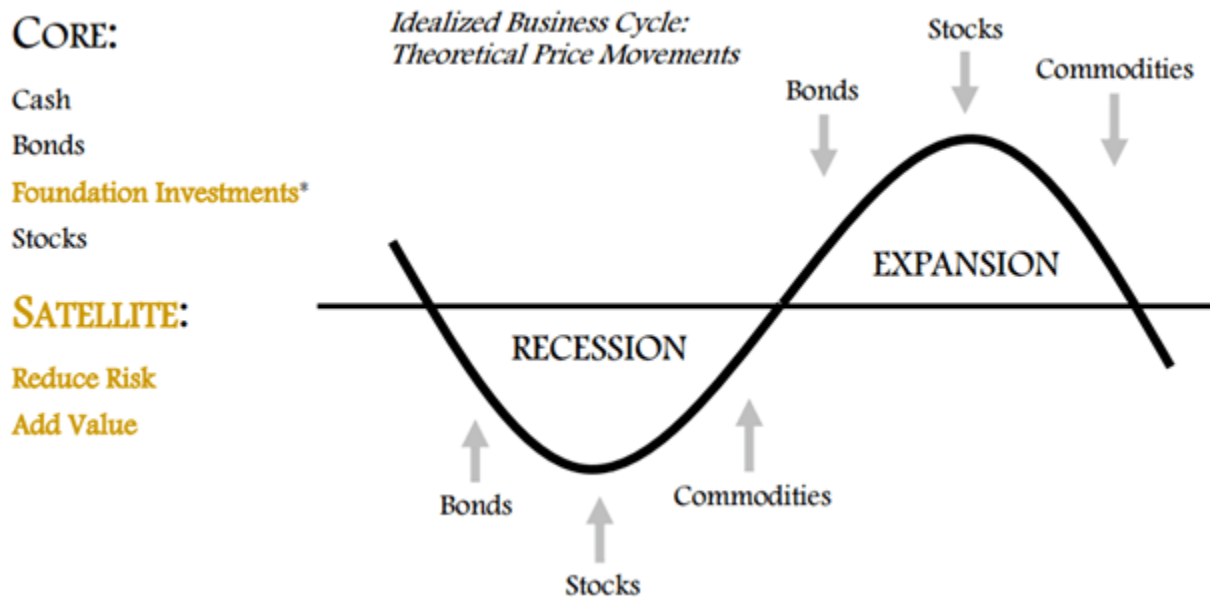
Core and Satellite Investment Approach

Investing is as much about taking risk as it is about managing risk. Growing the capital you need to meet certain goals while also protecting your existing wealth is a balancing act between these two things. This Kansas wealth management firm employs a [core and satellite investment approach](#).

At the core is a diversified mix of global holdings, and these serve as the strategic investments designed to help clients see growth and gains. At the

same time, there is a satellite portion of these investments designed to profit from current market conditions and mitigate any losses that may be sustained in the core.

This Kansas wealth management firm's investment philosophy is rooted in "[conservative, value-based investment strategies](#)."



Range of Financial Planning Services

Sunrise offers a comprehensive suite of financial planning services. The range of assistance offered by this Kansas wealth management firm makes it a "one-stop shop" for financial advice.

Some of the [specific services](#) that Sunrise offers under this umbrella, among others, include:

- Investment management
- Retirement planning
- Pension maximization
- Social Security optimization
- Estate planning
- Tax planning
- Health care & Medicare
- Insurance-needs analysis

Assistance for the "Emerging Affluent" and Businesses

Sunrise Advisors mainly focus on assisting high-net worth individuals and their families. Nevertheless, this wealth management in Kansas can also work with families, individuals, and business owners that are considered “[emerging affluent](#)” .

This flexibility to work with individuals and families who do not yet fit into the typical "high net-worth" classification provides assistance to those who have not yet maximized their investments.

It is also a smart strategy on the part of this Kansas wealth management firm because if these emerging affluent clients realize continued success, they have already established a relationship with Sunrise Advisors.

Sunrise [can also help](#) businesses with business planning, CFO services, accounting and tax services, retirement plan design, third party administration for qualified plans, benefit analysis, stock option modelling, business valuation, business succession and transition, and buy-sell agreements.

Windward Private Wealth Management, Inc. Review

[Windward Private Wealth Management, Inc.](#) is a Registered Investment Advisor with offices in Overland Park, Kansas and North Kansas City, Missouri. They hold themselves to the Fiduciary Standard and receive their compensation through a [fee-only](#) structure. Their offices are located in Overland Park, Kansas, and North Kansas City, Missouri.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm

Listed below are some of the features of Windward Private Wealth Management, Inc. that merited the firm’s inclusion on our list of this year's top financial advisory firms in Kansas and Missouri.

A Team of Advisors

Your account is reviewed by several divisions within Windward. These include wealth managers, tax specialists, investment specialists, legal and insurance specialists, and client service associates.

The team approach taken by this wealth management firm in Missouri and Kansas maximizes the input you receive on your investments. It gives you access to several perspectives that can help you make a well-informed decision and reach your goals faster.

Fee-Only, Fiduciary System

Windward is fee-only, meaning they will charge you a fixed fee for drawing up and implementing your financial plan.

Nothing else is charged. This wealth management firm in Missouri and Kansas receives no financial incentives, no commission, and no extra fees based on the recommendations you receive from your financial advisor or other members of the Windward team. This helps you ensure that anything your financial advisor suggests putting in your portfolio or plan is recommended with your best interests in mind.

They are not only morally inclined to do this, but legally obligated to as well. Their suggestions cannot be motivated by extra charges or fees. Instead, they must focus on recommending products and strategies that will enrich their client.

Custom Investment Strategies

Your Windward advisor, along with the Windward team, will review your current portfolio. They will evaluate it for improvements and make recommendations accordingly. Factoring in additional considerations like your risk tolerance and future goals, they will draft a customized investment strategy for you.

From there, Windward will stay on top of your portfolio with continuous monitoring. Additionally, they will update you regularly with news about your account. Windward will also make suggestions on opportunities you might want to take advantage of as well as assets you may need to reconsider.

The Windward Process

Windward's process of crafting a financial plan for each client is the same. This ensures consistency in the firm's approach in working toward a detailed, comprehensive analysis. It also goes a long way to achieving client satisfaction.

But the uniformity of their approach doesn't mean that Windward applies the same plan to each client. Rather, each plan is customized around your financial posture, financial needs, and future goals.

To guarantee that each facet of your financial life is taken into consideration, Windward takes you through a 5-step process. Each step involves a meeting with your Windward financial advisor wherein specific points are discussed.

How It Works



The [5-step process](#) includes:

- **Mutual Discovery Meeting**: During this meeting, your financial advisor gets to know you, your values, goals, assets, needs, and so on. This time is for you to get to know Windward, too. You ask questions of the firm that are most important to you, and together you decide whether Windward is a good fit.
- **Investment Planning Meeting**: This meeting takes place two weeks later. Windward takes you step-by-step through their investment management strategy, assesses your financials for risk tolerance, and reveals their recommended investment plan personalized to your needs.
- **Mutual Commitment Meeting**: One week later, you sign your contract with Windward along with the necessary paperwork to open your account and transfer your investments.
- **45-Day Follow-up Meeting**: As the name implies, you'll meet with Windward again 45 days after your Mutual Commitment meeting. Here your advisor will produce your finalized investment plan. You'll also review the transfer of your assets, plan implementation, and brokerage statements.
- **Regular Progress Meeting**: This meeting occurs 90 days after your 45-day follow-up. In addition to reviewing the progress of your portfolio, your financial advisor will consult with you about additional financial planning and wealth management services. Some of these include wealth transfer, philanthropic giving, and wealth protection, among others.

From there, you will meet with your financial advisor at least once a year and you can meet with your advisor whenever you need. Otherwise, they remain available by phone or email.

Conclusion - Top 9 Financial Advisory Firms in Kansas and Missouri

Investors in Missouri and Kansas have it pretty good. There's no shortage of qualified, experienced, fee-only, fiduciary financial advisors and Registered Investment Advisors in the area.

As the list above demonstrates, when you entrust your money to one of these companies, you're putting your future and the future of your family and loved ones in good hands.

But don't take our word for it. Most of the wealth management firms in Kansas and Missouri we've reviewed are more than happy to set up a free, initial consultation with you. They are eager to hear your story, to tell you theirs, and to earn your trust and your business.

Feel free to contact any one of these financial advisors in Kansas City today to get started on the path toward a secure future.

AdvisoryHQ Disclaimer:

Reasonable efforts have been made to present accurate information, however all info is presented without warranty. Review AdvisoryHQ's [Terms](#) for details. Also review each firm's site for the most updated data, rates and info.

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Image Sources:

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